

# EXPERIENCE A COMMUNITY FIELD TRIP™

A first-hand perspective on issues important to you.



## OVERVIEW

More than ever, communities in our own backyard face difficult challenges and limited resources. The good news is that nonprofits with deep ties to the local population have remained dedicated to consistently addressing needs and delivering a positive impact.

A Community Field Trip™ is an event that provides UHNW/HNW individuals and families the opportunity to learn first-hand about an issue that currently affects their community. Potential issue areas could include but not limited to food insecurity, animal welfare, education innovation, and environmental impact issues.

The group will engage with several nonprofits who have different approaches: conduct a site visit at one nonprofit, hear from several other nonprofit leaders who will provide additional information and insight.

## WHO SHOULD ATTEND?

UHNW/HNW Individuals and families who...

- Have a foundation, DAF or other charitable vehicle and are interested in this issue
- Are active or want to be more active in their family's giving
- Younger family members who want to start finding their own voice in philanthropy
- Parents who want to instill values in their children and can use this as an opportunity for discussion

## WHAT WILL ATTENDEES GET THROUGH THESE EXPERIENCES?

- A more personal perspective on the impact of this issue on their community
- A deeper understanding of how organizations are addressing an issue
- Get more insight on how to assess the impact of their grant

## WHY CO-HOST A COMMUNITY FIELD TRIP™ WITH STRATEGIC PHILANTHROPY, LTD.?

**What's in it for advisor firms?** Everyone wants to find ways to make a meaningful impact in the world. As a trusted advisor, you play a pivotal role in helping to plan for those commitments. In addition, it is an opportunity to showcase the firm's dedication to critical issues facing the community as well as leverage photos and information on the event on social media, in client newsletters, and a company website.

This is a consistent way to nurture strong long-term relationships across generations. Not only is philanthropy an important part of a truly integrated wealth management offering, but it is also a wonderful way to uncover the values and intentions of your clients. This allows advisors to be responsive and proactive in supporting their clients' life goals.

**Why Strategic Philanthropy, Ltd?** We bring over 20 years of knowledge and experience in framing issues and identifying organizations who are driving meaningful results. Our team conducts the research, vets the organizations we will be meeting, and develops all informational materials in order to provide all participants a foundation for our discussions.

We do not fundraise for, or promote, any nonprofit organizations. Our goal is to provide unbiased insight into change-making efforts and guidance on how to build open, supportive, and productive relationships with our community partners.

Instead of redirecting your team's time and effort to create this type of event, you can leverage Strategic Philanthropy's vast network and expertise to curate a seamless and inspiring experience for your clients.

## ESTIMATED FEES (for field trips in Chicago)

The costs provided below are estimates and for illustrative purposes only. A quote will be provided after we determine the specifics of your customized experience.

## SERVICES PROVIDED BY STRATEGIC PHILANTHROPY, LTD.

### Pre-Event

Issue Area Research  
Identifying Non-Profits  
Site Visit Coordination  
Event Planning  
Briefing Materials

### During Event

Introduce Topic/Issue  
Lead Site Visit  
Facilitate Discussion

### Post-Event

Complimentary  
Consultation  
with Client and  
their Advisor

### **Estimated Fee for Services**

- Event Planning and Facilitation Services – \$2,500
- Liability insurance - \$400.00

### **Honorarium for Three (3) Non-Profit Partners**

- A donation to recognize the time and energy of preparation and presentation - \$1,750

**Total Estimated Fees - \$4,650**

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### **OPTIONAL ADD-ONS**

- **Attendee Transportation - \$1,100**  
*Minibus or van for 20 people, 2 stops, return to starting point, 1:00 -5:00 pm, including gratuity and fuel.*
- **Debrief and networking reception at a local restaurant - \$900**

### **ADDITIONAL EXPENSES FOR A COMMUNITY FIELD TRIP™ OUTSIDE OF CHICAGO**

Field Trips outside of the Chicago area may require additional fees which can include expanded research and travel expenses to, plan, coordinate, and execute the event. Estimates for additional fees and expenses will be approved in advance.

## SAMPLE EVENT AGENDA - *Accessing Nutritious Food in Disinvested Communities*



### ORGANIZATIONS

- **Truly Living Well Natural Urban Farm** – K. Rashid Nuri, Boston-born and Harvard-educated and former Clinton appointee to the U.S. Agriculture Department
- **FoodCorps** – Debra Eschmeyer, Founder
- **Wholesome Wave** - Mallory Gegolian, Board Member

### AGENDA

2:00 pm	Arrive at <i>Truly Living Well Urban Farm</i>
2:15 pm	Overview of the issue
2:30 pm	Site visit / Tour of the farm
3:15 pm	Greenhouse tour and interactive discussion
3:30 pm	Depart
3:45 pm	Networking and discussion at Empire State South (restaurant) Chef's selection of appetizers and drinks
5:00 pm	Event ends

*"Thank you so much for the [site visits] yesterday. I had such a great experience and went home last night, and came back to work today, with renewed energy... I learned so much about our target organizations... I would love to do it again – anytime." – single family office executive participant*